

Employment Services Department

Easy System

Navigation – User Guide

Version 1.1 (July 2013)

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Please read this manual in conjunction with specific area guides such as

Easy Forms (E-Forms)
Easy Expenses (Manager and Self Service)
Easy Time and Attendance
Easy Payslips

**What is Easy**

Easy is a system developed by Giltbyte Software specifically and exclusively for the use of NHS organisations to enable the collection of payroll data electronically to reduce the administrative burden on organisations and modernise payroll data collection.

The software consists of Electronic Forms (E-Forms) Electronic Expenses and Electronic time and Attendance and electronic payslips.

There are additional modules available for Electronic Authorised Signature Lists and Finance Reporting.

Easy has developed areas for employee to claim items such as Self Service Expenses and to Leave booking and approval online.

Data Protection

Due to the sensitive nature of the information held on employees you will only be able to access / view information on staff who report to you. You will not be able to see any confidential information on other staff within the organisation.

Deadlines

Please remember that employees are paid currently for basic pay, and to pay staff on time it is necessary to complete the payroll early in the month. Therefore if you have a change to an employee's hours on 15th January, it is important that you complete and authorise the form by the 7th January to ensure the employee will be paid correctly in the January salary.

How Does it Work ?

Easy is not a replacement for the NHS Electronic Staff Record (ESR) system. It is designed to provide the information needed to maintain ESR and to keep it up to date. Easy is updated from reports generated in ESR and loaded to Easy.

Contact Us

If you have problems with your Easy account or require assistance please contact the Employment Services department :-

uhnspayroll@northstaffs.nhs.uk

More information and updated manuals can be found on our Web Site. Navigate to the Employment Services section and then select the Training materials tab and you will find the Easy guides.

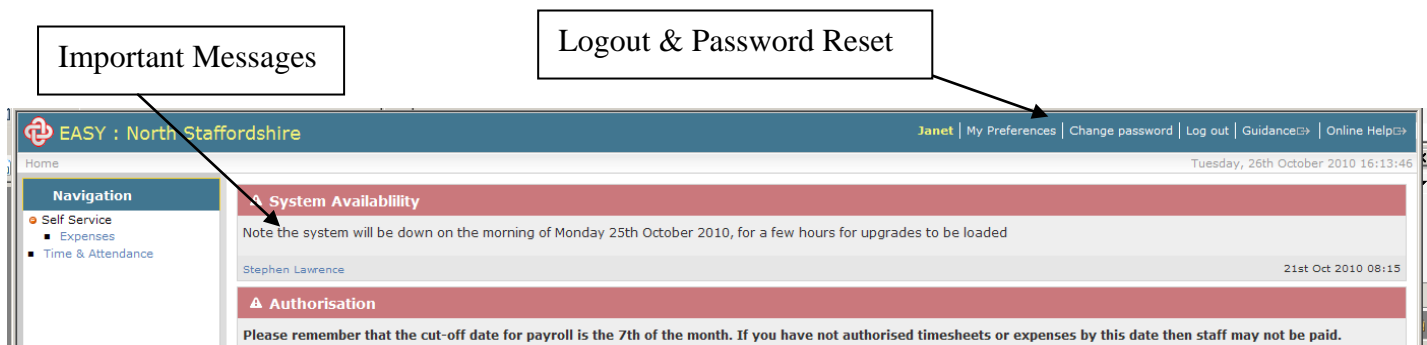
<http://www.staffs-sbs.nhs.uk/employment.php>

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Using Easy – Front Screen

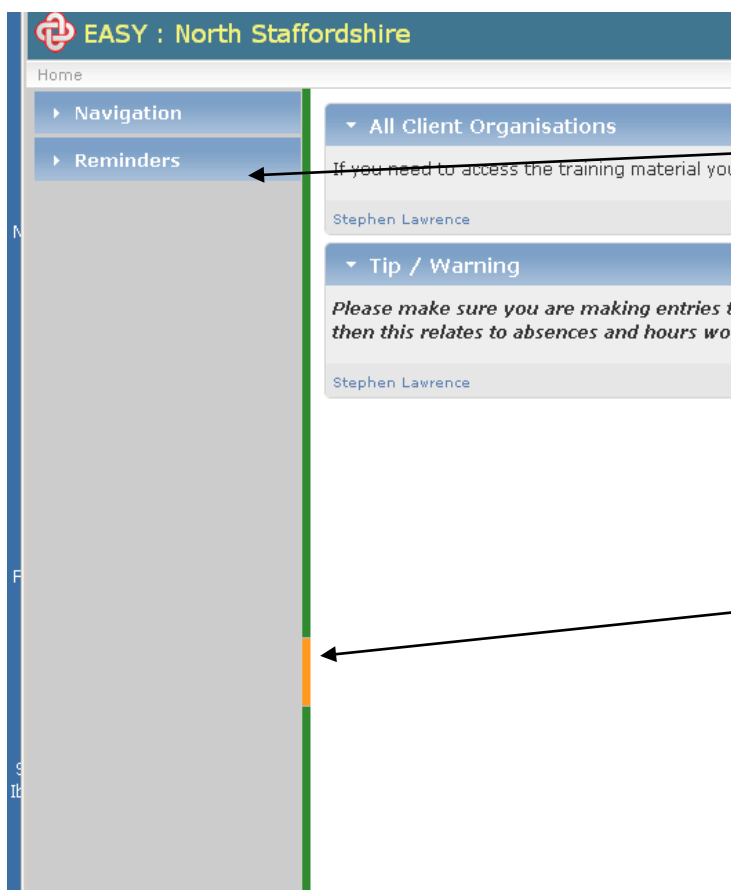
The Easy front screen contains any important messages – Please take time to read these in case they apply to what you wish to do.

On this screen you can change your password yourself by selecting the change password words on the top right of the Easy screen. You can also find the log out in this corner. It is important that you remember to log out of the system using the logout option rather than just using the 'x' in the top right hand corner.



Navigation Toolbar

The navigation bar is on the left hand side of the screen and there may be more than one navigation panel. There are a number of things you can do to make the screen less busy especially when making expenses entries and you require as much of the screen as possible.

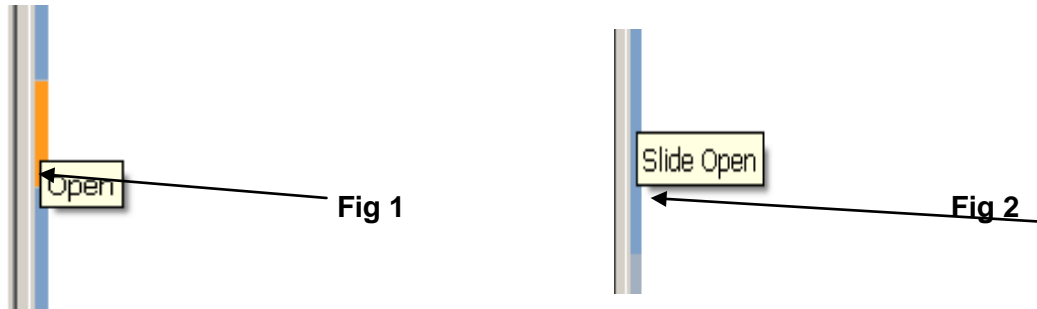


Navigation Panel

You can click on the navigation panel to navigate to the relevant section. If you have multiple navigations you may find some of the options at the bottom of your screen on the left hand side

Navigation Bar Display Status

You can decide if you want the panel to appear permanently or to hide. If you move to the centre of the panel you will see the cursor change colour (in this case orange) and if you click once with your left mouse button the panel will close. It is still there but at the very left of the screen. You can open it permanently by moving your cursor to the very left of the screen in the middle and you will find the open icon (Fig1). You can open the bar temporarily by clicking anywhere on the bar on the left hand side for the slide open (Fig 2).



Using the slide in Multiple Screens

Screens like the time and attendance have multiple layers due to them having a navigation bar and a list of employees names. In this case you have multiple options.

Using the slider functions described above you can decide to have the navigation bar and staff list open (Fig A), or the navigation bar closed and the staff list open (Fig B), or the staff list and the navigation bar closed (Fig C), so that all you see is the timesheet.

Fig A

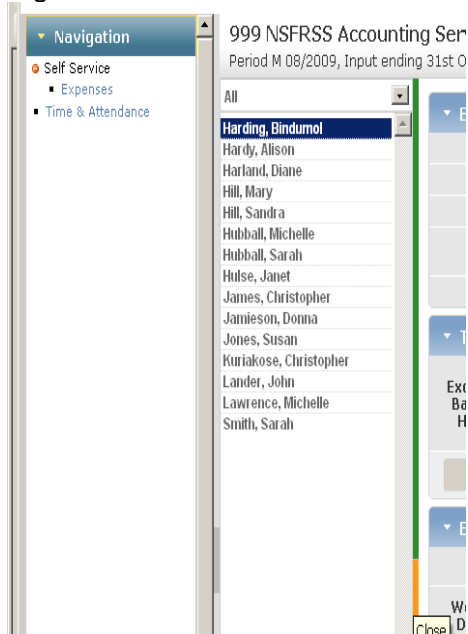


Fig B

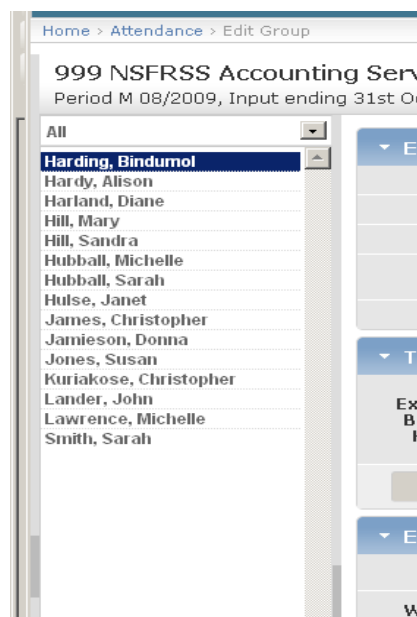
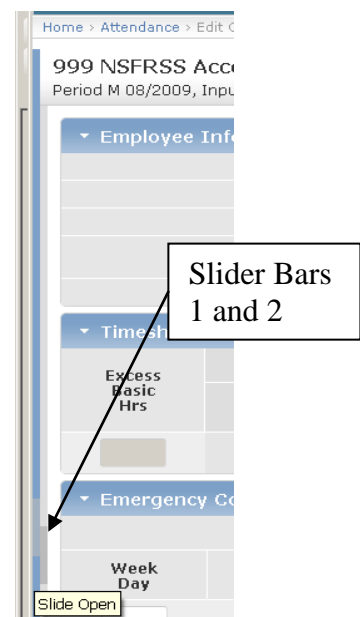


Fig C



If you decide to have both the Navigation Bar and the staff list closed, you can open them at any time using the open slider command on the far left.

In Time and Attendance if you select to close the navigation bar and staff list you will only see the individual you have chosen. When you save this record the staff list will automatically open again so you can select another employee.

This way you always have the option of a full screen for each employee.



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Easy Banners / Headers

You can close (minimise) sections in easy by clicking anywhere on the blue header bars. Once minimised the triangle turns to the right and you can make the section re-appear (maximise) by clicking on the blue header bar.

This may speed up your completion of the system when you do not display items you do not require.

Minimise / Maximise

To move between functions in Easy you can use the top of the screen by clicking on the word. So for example to get back to the home screen click on the word home

On-Line Help Guide

In the top right hand side of the screen you have the online help which will provide help for whichever screen you are currently on. This may save you some time rather than having to view the electronic / paper guides.

Navigate to the screen you want help on and then click the word 'Online Help'

This will provide on screen assistance in a separate web page. Just use the close screen to go back to the main Easy screen you were in.

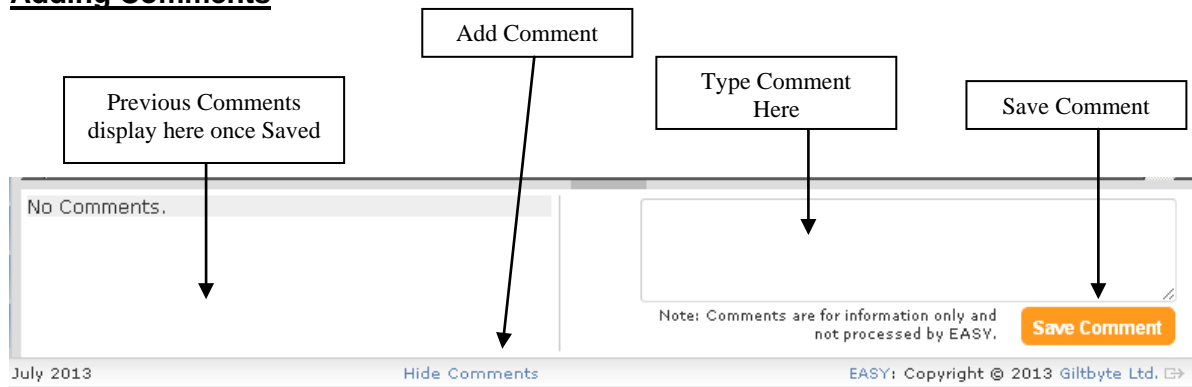
Adding Comments

In many of the E-Forms and Time and Attendance screens you will find the ability to add comments. This is in the centre at the bottom of the screen.

By clicking on the words Add Comment it will open the comments box

This provides the option to enter free text comments and to save these. To Save any comment click on the save button and to no longer display the comment box use the hide comments option. Note that any comments entered will be identified once saved in the left hand box with your name and when you entered the comments. When you enter the employee record it will advise you that it contains a comment if you have saved one.

Adding Comments



The screenshot shows the 'Add Comment' interface. Annotations with arrows point to the following elements:

- Previous Comments display here once Saved:** Points to the 'No Comments.' message in the left-hand pane.
- Add Comment:** Points to the 'Add Comment' button at the top center.
- Type Comment Here:** Points to the large text input area in the right-hand pane.
- Save Comment:** Points to the orange 'Save Comment' button at the bottom right of the right-hand pane.

Additional visible text in the interface includes:

- 'No Comments.' in the left pane.
- 'Note: Comments are for information only and not processed by EASY.' below the input area.
- 'Save Comment' button.
- Footer: 'July 2013', 'Hide Comments', and 'EASY: Copyright © 2013 Giltbyte Ltd. G'.

Please do not use the comment box unless you wish the payroll team to read the comment.

Please do not use the comments field excessively as this will slow all processes down.